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28th Annual Edition

Newspaper and Newsprint Facts at a Glance

1986

Newsprint Information Committee
420 Lexington Avenue
New York, N.Y. 10017

B.C. Forest Products

Crown Forest Industries

Great Lakes

Maclaren

MacMillan Bloedel

Ontario Paper

Q.N.S. Paper

To The Reader:

The Canadian newsprint producers who make up the Newsprint Information Committee are pleased to bring you this, the twenty-eighth annual edition of Newspaper and Newsprint Facts at a Glance.

We hope you will find this compendium of information about the newspaper and newsprint industries useful.

If you have any suggestions concerning material in this booklet, we would welcome them.

A list of the Canadian newsprint producers constituting the Newsprint Information Committee appears on the following page.

THE NEWSPRINT INFORMATION COMMITTEE

Members of the Newsprint Information Committee and their service representatives in the United States:

British Columbia Forest Products Ltd.
Crofton Paper Company, Inc.

Crown Forest Industries Ltd.
Crown Newsprint Sales Corp.

Great Lakes Forest Products Limited
Lake Superior Newsprint Co.

James Maclaren Industries Inc.
Maclaren Forest Products Inc

MacMillan Bloedel Limited
Powell River-Alberni Sales Corp.

Ontario Paper Company

Q.N.S. Paper Company Limited

NEWSPRINT INFORMATION COMMITTEE
420 Lexington Avenue, New York, NY 10017
(212) 697-5600

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1986 NEWSPRINT CAPACITY BY PRODUCERS

Canadian Mills	1986 Capacity in Metric Tons *	
Abitibi-Price Inc. (Group Total)		1,792,000
Alma, Que.	262,000	
Beaupre, Que.	30,000	
Chandler, Que.	222,000	
Fort William, Ont.	127,000	
Grand Falls, Nfld.	239,000	
Iroquois Falls, Ont.	254,000	
Kenogami, Que.	166,000	
Pine Falls, Man.	175,000	
Stephenville, Nfld.	159,000	
Thunder Bay, Ont.	158,000	
Boise Cascade Canada Ltd.		
Kenora, Ont.		248,000
Bowater Mersey		
Broklyn, N.S.		203,000
British Columbia Forest Products Ltd.		
Crofton, B.C.		438,000
CIP Inc. (Group Total)		1,065,000
Dalhousie, N.B.	329,000	
Gatineau, Que.	464,000	
Trois-Rivieres, Que.	272,000	
Consolidated-Bathurst Inc. (Group Total)		910,000
Grand' Mere, Que.	180,000	
Port Alfred, Que.	350,000	
Shawinigan Falls, Que.	320,000	
Trois-Rivieres, Que.	60,000	
Crown Forest Industries Ltd.		
Campell River, B.C.		449,000
Domtar Inc. (Group Total)		288,000
Dolbeau, Que.	146,000	
Donnacona, Que.	72,000	
Red Rock, Ont.	70,000	

*Preliminary

Canadian Mills (cont.)	1986 Capacity in Metric Tons*	
Donohue Inc. (Group Total)		391,000
Amos, Que.	166,000	
Clermont, Que.	225,000	
Great Lakes Forest Products Ltd.		
Thunder Bay, Ont.		404,000
Kruger Inc. (Group Total)		859,000
Bromptonville, Que.	196,000	
Corner Brook, Nfld.	371,000	
Trois-Rivieres, Que.	292,000	
James Maclaren Industries Inc.		
Buckingham, Que.		164,000
MacMillan Bloedel Ltd. (Group Total)		764,000
Port Alberni, B.C.	296,000	
Powell River, B.C.	468,000	
Ontario Paper Co. (Group Total)		667,000
Baie Comeau, Que.	402,000	
Thorold, Ont.	265,000	
Reed Inc., Quebec, Que.		380,000
Rothesay Paper Ltd.		
St. John, N.B.		314,000
St. Raymond Paper Ltd.		
St. Raymond, Que.		37,000
F. F. Soucy Inc., Riviere-du-Loup, Que.		168,000
Spruce Falls Power & Paper Co. Ltd.		
Kapuskasing, Ont.		341,000
Stora Forest Industries		
Point Tupper, N.S.		158,000
TOTAL CANADIAN CAPACITY		10,040,000

*Preliminary
Source: Canadian Pulp & Paper Assoc.

United States Mills	1986 Capacity in Metric Tons
Augusta Newsprint Co., Augusta, GA.	339,000
Bear Island Paper Co., Doswell, VA.	189,000
Boise Cascade Corp., Steilacoom, WA.	172,000
Boise Southern Co., DeRidder, LA.	305,000

United States Mills (cont.)	1986 Capacity in Metric Tons	
Bowater Southern Paper Corp.		
Calhoun, TN		635,000
Catawba Newsprint Co., Catawba, SC		220,000
Champion International (Group Total)		735,000
Lufkin, TX	327,000	
Sheldon, TX	408,000	
Crown Zellerbach Corp. (Group Total)		104,000
Port Angeles, WA	27,000	
Wauna, OR	77,000	
FSC Paper Corp. Alsip, IL		103,000
Garden State Paper Co., Inc. (Group Total)		312,000
Garfield, NJ	192,000	
Pomona, CA	120,000	
Great Northern Paper Co.		
E. Millinocket, ME		259,000
Inland Empire Paper Co., Millwood, WA		62,000
International Paper Co. Mobile, AL		—
Kimberly-Clark Corp., Coosa River Newsprint Div.		
Coosa Pines, AL		381,000
Manistique Papers, Inc.		
Manistique, MI		50,000
North Pacific Paper Co., Longview, WA		451,000
Publishers Paper Co. (Group Total)		527,000
Newberg, OR	332,000	
Oregon City, OR	195,000	
Southeast Paper Manufacturing Co., Dublin, GA		191,000
Southwest Forest Industries, Inc.		
Snowflake, AZ		254,000
TOTAL U.S. CAPACITY		5,289,000

Source: American Paper Institute and
American Newspaper Publishers Assn.

NORTH AMERICAN NEWSPRINT
CAPACITY, PRODUCTION, CONSUMPTION, SOURCES OF SUPPLY

Sources: ANPA, Canadian Pulp & Paper Assn., API

CAPACITY	1986 Metric Tons	1985 Metric Tons	1976 Metric Tons	1966 Metric Tons
U.S. Mills	5,289,000	5,331,000	3,604,282	2,401,343
Canadian Mills	10,040,000*	9,820,000	8,996,643	8,079,243
	15,329,000	15,151,000	12,600,925	10,480,586
PRODUCTION				
U.S. Mills		4,924,138	3,344,280	2,177,266
Canadian Mills		8,988,113	8,080,105	7,665,790
		13,912,251	11,424,385	9,843,056
U.S. CONSUMPTION				
By all Users		11,587,000	8,670,054	8,300,826
By Daily & Sunday Newspapers		8,724,521**	6,970,934	7,720,221
% of total consumption		75.3%**	80%	93%
U.S. SOURCES OF SUPPLY				
From Canada		57.3%	63.2%	72%
From U.S.		39.9%	36.2%	25%
From Overseas		2.8%	0.6%	3%

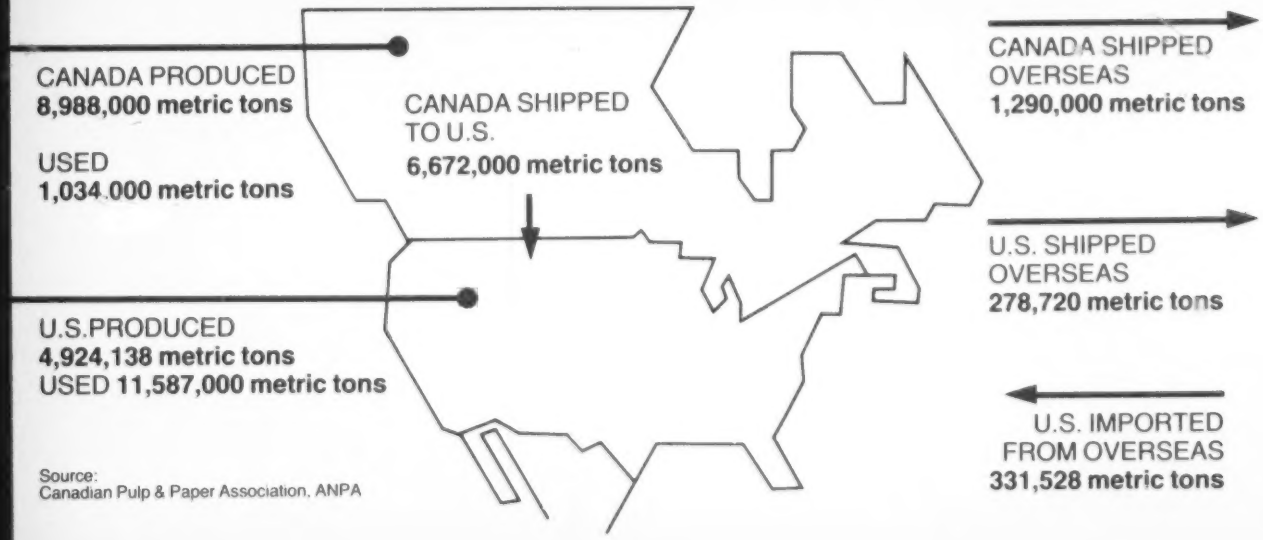
NOT AVAILABLE

*Preliminary

**See footnote, page 15

To convert metric tons to short tons, multiply by 1.1023.

FLOW OF NORTH AMERICAN NEWSPRINT, 1985



Source:
Canadian Pulp & Paper Association, ANPA

CANADA LEADS WORLD IN NEWSPRINT PRODUCTION

Source: CPPA

1985
Production, 000's*

Nation	Metric Tons	Percent of Total
Canada	8,988	32.2
United States	4,924	17.7
Japan	2,580	9.2
Sweden	1,628	5.8
U.S.S.R.	1,575	5.6
Finland	1,495	5.4
Norway	861	3.1
West Germany	715	2.6
Australia	381	1.4
Britain	338	1.2

*Estimated
Total World Production (1985 Est.)—27,894,000 metric tons
(Total includes Peoples' Republic of China.)

U.S. IS WORLD'S LEADING CONSUMER OF NEWSPRINT

Source: CPPA

1985
Consumption, 000's*

Nation	Metric Tons	Percent of Total
United States	11,587	41.5
Japan	2,742	9.8
Britain	1,442	5.2
West Germany	1,253	4.5
U.S.S.R	1,211	4.3
Canada	1,034	3.7
Australia	608	2.2
France	603	2.2
India	408	1.5
Netherlands	407	1.5
Italy	367	1.3

*Estimated
Total World Demand (1985 Est.)—27,907,000 metric tons
(Total includes Peoples' Republic of China.)

THE PRICE OF NEWSPRINT—1935–1985*

Short Tons		Short Tons	
1935	40.00	1959	$134.00
1936	41.00	1960	134.00
1937	42.50	1961	134.00
1938	50.00	1962	134.00
1939	50.00	1963	134.00
1940	50.00	1964	134.00
1941	50.00	1965	134.00
1942	50.00	1966	136.92
1943	54.66	1967	140.50
1944	58.00	1968	142.00
1945	60.25	1969	147.00
1946	72.25	1970	152.00
1947	88.50	1971	157.33
1948	97.67	1972	164.58
1949	100.00	1973	175.00
1950	101.00	1974	210.00
1951	111.00	1975	260.00
1952	121.00	1976	282.50
1953	126.00	1977	302.50
1954	126.00	1978	320.00
1955	126.00		
1956	130.00	**Metric Tons**	
1957	133.00	1979	$386.11
1958	134.00	1980	436.50
		1981	482.50
		1982	495.00
		1983	484.25
		1984	515.40
		1985	535.00

*Annual average contract price per ton delivered at New York City. Prices through 1973 are for 32-lb. paper; thereafter for 30-lb. One metric ton equals 1.1023 short tons.

NEWSPRINT AS AN ELEMENT OF TOTAL PUBLISHING COST

Typical dailies	1984	1985
Daily of 1,000,000 + circulation	23.5%	23.1%
Daily of 250,000 circulation	28.1%	27.6%
Daily of 50,000 circulation	21.3%	21.2%
Daily of 9,000 circulation	14.1%	14.5%

(85% of all dailies have less than 50,000 circulation)

U.S. NEWSPRINT CONSUMPTION

1955-1985

Year	Short Tons (Thousands)	Year	Short Tons (Thousands)
1955	6,223	1970	9,117
1956	6,468	1971	9,248
1957	6,436	1972	9,938
1958	6,229	1973	10,195
1959	6,704	1974	10,102
1960	6,962	1975	9,172
1961	6,919	1976	9,577
1962	7,018	1977	10,228
1963	7,075	1978	10,878
1964	7,539		
1965	8,016		Metric Tons
1966	8,580	Year	(Thousands)
1967	8,660	1979	10,199
1968	8,744	1980	10,088
1969	9,239	1981	10,164
		1982	10,108
		1983	10,589
		1984	11,431
		1985	11,587

Source: ANPA, CPPA

Note: Tonnage for years prior to 1974 has been recalculated to a 30-pound basis for comparative purposes.
To convert short tons to metric tons, divide short tons by 1.1023.

NEWSPRINT MISCELLANY

Basis Weight/Grammage

The weight in pounds of a ream (500 sheets) of newsprint 24 by 36 inches (equal to 3,000 square feet) is its basis weight. Virtually all U.S. and Canadian newsprint capacity is on a nominal 30-lb. basis weight standard. In metric terms, this is expressed as grammage, or the weight in grams of one sheet of newsprint measuring one square meter. Thus a 30-lb. basis weight is equivalent to a grammage of 48.8 (more frequently expressed as 48.8 g/m^2).

Basis weight/grammage conversion tables appear on page 27.

Newsprint Storage

ANPA/RI recommends storing newsprint at a temperature of 60° to 70° F. Newsprint that has been in transit under frigid conditions should be kept in a warm storage room several weeks before it is used on press.

Unwound newsprint gives up or takes on moisture in seconds; therefore, says ANPA/RI, most experts recommend that the pressroom envircnment be maintained at 45 percent relative humidity. Many newspapers have humidity control devices in their pressroom air handling systems or supplemental humidity units operating in the pressroom areas. Proper humidity conditions definitely aid runability.

Newsprint and Environment

Wood for newsprint is a renewable natural resource. In Canada, it comes from nearly a million square miles of forest, 80 percent owned by the public. Wood is harvested in accordance with rules laid down by the provincial governments.

The forests are managed so as to give perpetual yield. The annual cut is far less than annual growth. Thus the current wood supply can be maintained in perpetuity. Mature trees left unharvested fall prey to fire, insects, disease, and decay.

Canadian mills are involved in a costly long-term anti-pollution program. Meanwhile, both government and industry researchers continue to seek improved methods of waste disposal.

Over three million tons of old newspapers are collected annually in the U.S. for recycling in the U.S. and overseas, according to the American Paper Institute. They go into such products as paperboard, wallboard, insulation and more than a million tons of reprocessed newsprint.

DATA ON U.S. NEWSPAPERS

	1985	1984	1975
U.S. Daily Newspaper Circulation[1,2,3]			
Morning Newspapers	36,361,561	35,424,418	25,490,186
Evening Newspapers	26,404,671	27,657,322	35,165,245
Total Dailies	62,766,232[4]	63,081,740	60,655,431
U.S. Sunday Newspapers	58,825,978[5]	57,573,979	50,580,289
U.S. Weekly Newspapers	48,988,801[6]	43,092,465	35,176,130
Average Pages Printed[7]			
U.S. Dailies			
A.M. Papers	89[8]	87[8]	56[9]
P.M. Papers	74[8]	72[8]	
Sunday Papers	336[8]	295[8]	180[10]
Advertising Expenditures			
U.S. Daily and Sunday Newspapers[7]	$25,170,425,000	$23,522,635,000	$8,234,000,000

1. ANPA/Editor & Publisher. 2. 1985 figures preliminary; 1984 figures revised. 3. 1985 figures for 482 morning dailies and 1,220 evening dailies. 4. Includes 26 "all-day" newspapers which are listed in both morning and evening columns but only once in the total. 5. 798 Sunday newspapers. 6. 7,704 weekly newspapers. 7. Newspaper Advertising Bureau. 8. Includes preprints on a lineage basis. 9. Average, 113 papers in top markets. 10. Average, 72 papers in top markets.

LARGEST U.S. DAILIES

Circulation*		1985 Newsprint Usage** (Metric Tons)
1,985,559	The Wall Street Journal (m)	163,131
1,275,268	New York Daily News (m)	174,500
1,168,222	USA Today (m)	120,000
1,088,155	Los Angeles Times (m)	387,670
1,035,426	The New York Times (m)	324,000
781,371	The Washington Post (m)	224,077
760,031	Chicago Tribune (m)	202,599
751,798	New York Post (all day)	62,420
650,445	The Detroit News (all day)	122,596
645,266	Detroit Free Press (m)	88,244

*ABC FAS-FAX figures as of March 31 & May 22, 1986. Source: Audit Bureau of Circulations.
**Independent Verification

LARGEST U.S. NEWSPAPER COMPANIES (Ranked by Daily Circulation)

Company	Daily Papers	Daily Circulation[1]	Sunday Papers	Sunday Circulation[1]
Gannett Co.[2]	90	5,508,046	60	4,737,037
Knight-Ridder Newspapers	27	3,626,661	22	4,374,514
Newhouse Newspapers	26	2,932,625	20	3,613,602
Tribune Co.	8	2,638,270	7	3,443,459
Dow Jones	23	2,469,623	10	400,153
Times Mirror	8	2,448,348	8	3,188,646
News America Publ. (Murdoch)	4	1,947,234	3	1,147,500
New York Times Co.	26	1,693,316	15	2,258,137
Scripps-Howard Newspapers	21	1,615,505	9	1,652,066
Thomson Newspapers	90	1,452,426	45	938,870

1. Average for six months ended September 30, 1985.
2. Includes pending acquisition of the Evening News Association.
Source: Morton Research, Lynch, Jones & Ryan; Audit Bureau of Circulations.

NEWSPAPER NEWSPRINT CONSUMPTION BY STATES* (Metric Tons)

	1985	1984	Percent Increase/ Decrease
New England States			
Connecticut	108,420	104,084	+ 4.2
Maine	22,738	22,421	+ 1.4
Massachusetts	289,679	281,557	+ 2.9
New Hampshire	19,316	17,333	+ 11.4
Rhode Island	38,870	36,746	+ 5.8
Vermont	7,486	7,309	+ 2.4
Total	486,509	469,450	+ 3.6
Middle Atlantic States			
New Jersey	338,334	298,428	+ 13.4
New York	904,249	875,755	+ 3.3
Pennsylvania	410,608	421,923	– 2.7
Total	1,653,191	1,596,106	+ 3.6
South Atlantic States			
Delaware	16,150	15,597	+ 3.5
District of Columbia	234,437	229,478	+ 2.2
Florida	554,656	540,743	+ 2.6
Georgia	187,586	170,635	+ 9.9
Maryland	108,210	103,714	+ 4.3
North Carolina	153,292	136,365	+ 12.4
South Carolina	68,076	62,197	+ 9.5
Virginia	132,189	124,483	+ 6.2
West Virginia	30,715	30,174	+ 1.8
Total	1,485,311	1,413,386	+ 5.1
East North Central States			
Illinois	438,667	447,263	– 1.9
Indiana	139,261	134,248	+ 3.7
Michigan	313,199	295,374	+ 6.0
Ohio	334,095	330,398	+ 1.1
Wisconsin	127,482	125,971	+ 1.2
Total	1,352,704	1,333,254	+ 1.5
East South Central States			
Alabama	71,395	69,487	+ 2.7
Kentucky	72,843	70,704	+ 3.0
Mississippi	35,596	35,300	+ 0.8
Tennessee	115,386	116,617	– 1.1
Total	295,220	292,108	+ 1.1

	1985	1984	Percent Increase/ Decrease
West North Central States			
Iowa	70,203	74,758	– 6.1
Kansas	43,144	42,083	+ 2.5
Minnesota	125,976	110,967	+ 13.5
Missouri	174,246	175,321	– 0.6
Nebraska	47,719	46,188	+ 3.3
North Dakota	13,146	13,254	– 0.8
South Dakota	9,664	9,691	– 0.3
Total	484,098	472,262	+ 2.5
West South Central States			
Arkansas	50,074	44,923	+ 11.5
Louisiana	121,894	122,337	– 0.4
Oklahoma	82,485	79,778	+ 3.4
Texas	748,795	770,088	– 2.8
Total	1,003,248	1,017,126	– 1.4
Mountain States			
Arizona	149,646	140,471	+ 6.5
Colorado	195,139	196,350	– 0.6
Idaho	16,909	15,731	+ 7.5
Montana	13,323	14,174	– 6.0
Nevada	39,453	37,953	+ 4.0
New Mexico	28,884	27,292	+ 5.8
Utah	39,492	37,928	+ 4.1
Wyoming	5,997	6,540	– 8.3
Total	488,843	476,439	+ 2.6
Pacific States			
Alaska	23,410	25,888	– 9.6
California	1,196,556	1,176,386	+ 1.7
Hawaii	27,302	25,857	+ 5.6
Oregon	90,730	87,949	+ 3.2
Washington	137,399	145,646	– 5.7
Total	1,475,397	1,461,726	+ 0.9
TOTAL U.S.	8,724,521	8,531,857	+ 2.3

Source: ANPA

*This ANPA compilation reflects 1985 newsprint consumption by 1,752 dailies as well as some foreign language, college and special service publications such as trade newspapers. The 8,724,521 metric ton total represents 75.3 percent of the estimated total U.S. consumption of 11,587,000 metric tons by all users.

To convert metric tons to short tons, multiply by 1.1023.

RESEARCH FOR NEWSPAPERS

For more than two decades, the Canadian newsprint producers of the Newsprint Information Committee have financed research projects in behalf of their customers, the newspapers. By defining the newspaper medium's strengths, the research findings have helped sell tens of millions of dollars worth of newspaper advertising, according to the Newspaper Advertising Bureau.

The most recent project, a two-year study that began in 1985, was the eleventh under committee sponsorship in conjunction with the NAB. It addresses what is probably the number one priority in newspaper research today: the measurement of the performance of individual newspaper ads.

Highlights of this study and the previous ten research projects are presented in this section. Complete results of the first ten studies are available from the NAB.

"Continuing Study of Advertising Performance"

If newspapers are to attract and keep advertisers' business, they must be able to prove with hard facts that specific ads work. There lies the impetus behind this most recent study.

NIC committed $100,000 in seed money to help the NAB assemble and package the research and to conduct related experiments, bringing the group's total contributions to newspaper ad research since 1960 to $850,000.

Thirty-three newspapers have volunteered to do 50 studies of ads in specific issues of their newspapers. They are conducting telephone interviews with known subscribers, and cover between ten and fifteen ads per interview. NAB prepared a manual that explains how to do the interviews and will compile the information and lay it out in promotional materials.

The project will provide hard data on the likelihood that a reader will open the page on which the ad appears, and on the readers' interest in the ad.

NAB has already found that the average reader sees about 80 percent of a newspaper and that his interest in any one ad is about four times higher if he is a prospective buyer than if he is unlikely to buy the product. When the study is complete, every ad will be a case history that reminds the advertiser, at the very least, that his ad will be seen by four out of five readers of the paper and that it

will get the selective attention of the live customers he really wants to reach.

Beyond its value as a sales tool, the study will help to provide advertisers and ad agencies with guidelines on what makes for effective ad copy and layout.

The study differs from earlier ones in that it emphasizes the exposure opportunity represented by page-opening and the high interest that active prospects have in specific ads. In the past, radio and television stations were able to misuse noting scores by suggesting that newspaper ads were seen or read by only a fraction of the readers. By looking at the effectiveness of specific ads, this current study will get to the heart of the question—what works in newspaper advertising?

"Classified Advertising: Its Audience and its Consequences"*

This study focuses on four basic areas of classified advertising: automotive, employment, real estate and general merchandise. The study also deals with home deliveries versus newsstand and vending machine sales, readership of Sunday classified sections, and classified advertising in other sections of the newspaper, such as sports or business-financial.

Findings show that among U.S. adults who read a newspaper on an "average day":

- 24 out of 100 look at employment classified—a 60% increase over a 1971 figure of 15 out of 100.
- 23 out of 100 look at real estate classified—a 15% increase.
- 20 out of 100 look at automotive—another big jump of 67%.
- 28 out of 100 look at general merchandise classifieds—a 40% increase over 1971.
- 10 out of 100 look at recreational or sports equipment classified, and the same number look at classified ads for household services or other services.

On an average day also:

- 7% of adults (11 million people) are "actively looking" for a new job.
- 6% (9 million) are "actively looking" for a car.
- 5% (7.5 million) are seeking to rent a house or apartment.
- 5% (7.5 million) are looking for homes to buy.

Reader attitudes toward classified advertising rated high:

"A good place to advertise things you want to sell" 79%

"Makes it easy to find what you want"	76%
"Helpful!"	71%
"A good way to look for a house or apartment"	72%
"A good way to look for a job"	55%
"Helps you save money"	43%

The classified studies led to step-by-step marketing programs designed by NAB to show newspapers how they could sell more classified advertising.

The programs enable newspapers to provide advertisers with facts and figures on "hot," "warm" and "cold" prospects, with advice on how each might be approached. They cite exemplary classified ads that have worked for others.

*A 1979-80 survey by Response Analysis Corporation, financed by the newsprint companies making up the Newsprint Information Committee and supervised by the Newspaper Advertising Bureau.

"How the Public Gets Its News"*

The most comprehensive of its kind ever made, the study is being used as a guideline by hundreds of newspapers conducting localized research to improve readership.

Here are a few of the scores of findings:

1. Most people want more news in the paper rather than less news and more entertainment.

2. To build circulation, newspapers must focus on the occasional and infrequent readers rather than nonreaders.

3. TV newscasts and newspapers are probably not in competition. Newscast viewers and newspaper readers are frequently the same people.

4. Infrequent readers are often poor, young, single, rural, and black.

The study produced fifteen detailed spinoff studies covering such subjects as readership, content, advertising, home delivery and patterns of exposures to the news in the mass media.

The titles are:

- News Sources and Interests of Blacks and Whites
- The Personal Newspaper: Public Ratings of 34 Newspaper Subject Areas
- Young Adults and the Newspaper
- Young Adults and the Newspaper: A Supplemental Analysis
- Influence of Childhood Exposure to Newspapers on Adult Habits
- Seven Days in March: Major News Stories in the Press and on TV
- Two Dimensions of News: Interest and Importance Ratings of the Editorial Content of the American Press

- Readership and Coverage of Science and Technology in Newspapers
- Adult Readership of Weekly Newspapers and Shoppers
- The Home Delivery Population: Characteristics and Readership Patterns
- It's News to Me: Personal Reactions to the News
- The Newspaper Advertising Audience: Public Interest in Advertising and Shopping Behavior
- The Daily Diet of News: Patterns of Exposure to News in the Mass Media.
- Identifying Prospects for the Newspaper: Frequent Readers, Infrequent Readers and Nonreaders
- Technical Appendix: Sampling and Questionnaires

* A 1978 survey by Audits & Surveys, Inc., financed by the newsprint companies making up the Newsprint Information Committee and supervised by the Newspaper Advertising Bureau.

"Shoppers on the Move"*

Based on nearly 18,000 interviews in five leading markets across the country, this study charted shoppers' travel patterns. It was designed to aid retailers in planning media strategy for advertising and promotion. The research determined who the shoppers are, how far they drive, and how much they have to spend.

Shopping is a pleasure: Most women shop once a week for general merchandise items; more often than going to church, to a movie, or out to dinner.

Shoppers love to travel: Nearly nine out of 10 shopping visits in all markets were made by car—even half of downtown shopping is by car. Only 33 percent shop mostly in neighborhoods, while 67 percent either range far and wide or divide their shopping equally between nearby and more distant stores.

High income shoppers travel farther: Among families with $15,000 or more a year, 52 percent of shopping visits are more than five miles from home. For incomes under $10,000, the figure drops to 36 percent.

Under-35s travel farther: Shoppers 18 to 34 years old go five miles or more from home in 49 percent of their shopping visits; in the 35-to-64 age group the figure is 43 percent. These are prime customers.

Shoppers don't plan in advance: 53 percent say they are in the shopping area because of some immediate need, so day-in, day-out advertising coverage is vital.

The market is thin: Even for a very popular item such as personal hosiery, less than 2 percent of all women are in the market on a given day.

Food shopping: This is the most frequent kind of retail shopping. Out of all store visits for all purposes, 41 percent are to supermarkets or food stores. Seven out of ten women make at least one major trip per week, and regular newspaper readers make more major shopping trips than nonreaders do. About half of all women patronize two or more stores over a four-week period. In addition, women do not confine their major food and grocery buying trips to a single shopping area: in the course of four weeks, 24 percent of the shoppers went to two areas for the major food trip, and 8 percent went to three or more.

Movie-going: Overall, 28 percent report attending one or more movies in the last month. Movie-going is most common among the young and the well educated. Nearly two-thirds (64 percent) of all movie-goers attended theaters only outside their own neighborhoods.

Dining out: In the course of a month, 69 percent of the women in this five-city study had at least one evening meal in a restaurant. About half of these dined out three times or more. Over half (55 percent) of those eating out did not patronize restaurants in their own neighborhood, but neighborhood dining is more common in bigger cities than in smaller cities.

How newspaper works: 77 percent of the men and 81 percent of the women said newspapers are "the best kind of store advertising." Three out of four shoppers in the store today read a newspaper yesterday.

* A 1975 survey by Response Analysis Corp., Princeton, N.J., financed by the newsprint companies making up the Newsprint Information Committee and supervised by the Newspaper Advertising Bureau.

"Psychographics of the Newspaper Audience"*

Previous research has established that no matter whether one defines the market for a product in terms of age, income, education, etc., the newspaper has the broadest coverage. Now this is demonstrated as well in terms of psychographics, a measurement system widely used by ad agencies and national advertisers.

Intensive interviews were conducted with a national sample of 4,000 men and women. The sample was found to divide into 16 psychographic groups, or target audiences, those in each group having similar personalities, life styles, and personal values.

This gives creative guidance for advertisers—how to advertise various product lines so as to appeal to a given group. The study also shows that through newspapers the advertiser can reach these groups more completely than through specialized media—more

beauty-aid buyers than women's magazines, more sports car buyers than sports magazines, etc.

*A 1973 survey by Behavioral Analysis, Inc., and Commercial Analysts, Inc., financed by the newsprint companies making up the Newsprint Information Committee and supervised by the Newspaper Advertising Bureau.

"What Can One Newspaper Ad Do?"*

One of the largest field experiments ever undertaken to measure advertising effects, this study involved over 2,400 interviews in six typical markets. Actual ads of actual products were used as a test base. Chief findings:

1. One national ad in a newspaper has immediate effect on sales of the advertised brand and attitudes toward it.

2. An ad singles out and communicates best to those most likely to be customers.

3. Newspaper advertising is highly efficient in any comparison with television.

More specifically, on the first point: An ad for a particular brand boosts sales for the whole commodity category by 15 percent; increases sales of the advertised brand by 16 percent; increases the brand's share of the market by 10 percent; increases the proportion of those who would pick the brand "next time I buy" by four percent.

*A 1969 survey by Opinion Research Corp. financed by the newsprint companies making up the Newsprint Information Committee and supervised by the Newspaper Advertising Bureau.

"When People Want to Know. . . Where Do They Go to Find Out?"*

Samples of news, editorial and advertising material—some 240 items in all—were culled from the four major media (newspapers, magazines, television and radio). Each item was condensed to a one- ot two-sentence description on a flash card. The medium in which it appeared was not identified. Respondents were asked: "Which medium would you turn to to find out more about this subject?" Newspapers were the favored source for three out of five news and editorial items and three out of five advertising items.

*A 1967 survey by Opinion Research Corporation financed by the newsprint companies making up the Newsprint Information Committee and supervised by the Newspaper Advertising Bureau.

"The Retail Customer: How, When and Where She Shops and Spends"*

This major study charted the dynamics of the retail market from interviews with 10,382 women twice in suc-

cessive weeks in five cities of varying sizes across the country. Data included buying behavior with respect to 145 kinds of commodities.

1. America's huge volume of retail sales is generated from relatively small percentages of women planning, shopping, and spending in any week.

Only seven out of 100 women interviewed in Week I said they planned to buy a dress soon. Only five out of a hundred shopped for a dress. Only three out of a hundred bought. This means retailers must reach 3,330 women to find those who will buy every 100 dresses sold in a week in all stores in town.

The same principle faces all retailers. In major appliances, only six out of 1,000 women bought in a sample week. Therefore, 16,700 women must be reached to sell every 100 major appliances sold in all stores in town in a week.

2. Priority of items on a customer's "plan-to-buy" list changes constantly. Thus, the retail market changes daily.

Top-of-the-mind readiness to buy ("I plan to buy it soon") accounts for only 26 percent of the general merchandise items that are bought during the shopping week. Three out of four of the 28,474 purchased items were not mentioned as "plan-to-buy-soon" items just one week earlier.

3. The effect of increased newspaper advertising was measured store by store and customer by customer in five categories of merchandise.

Stores which increased their newspaper linage at least 10 percent from Week I to Week II developed a 12 percent greater rate of follow-through from plans to store visits than stores with no linage increase.

*A 1966 survey by Opinion Research Corp., supervised by Newspaper Advertising Bureau, financed by the newsprint companies of the Newsprint Information Committee.

Prospects See Twice as Many National Ads as Non-Prospects*

- Newspapers are read systematically. 82% of the pages carrying national advertising of 100 lines or larger are opened and scanned by the average reader.
- The mass exposure opportunity represented by this 82% page opening is remarkably consistent for men and women of all ages, income, education, and geographical location.

- Because of this high page opening, and allowing for varying ad size, there is no real difference between one product category and another in the likelihood that the reader will open the page carrying the ad, stop, and read something on that part of the page where the ad appears.
- Each reader searches through the newspaper for information that is relevant, interesting, and meaningful to him.
- Real prospects for a product, those who buy a product often and find its use pleasant and interesting, are twice as likely as non-prospects to report seeing and looking for ads.

*Source: "A Study of the Opportunity for Exposure to National Newspaper Advertising" by Audits and Surveys, Inc. for the Newspaper Advertising Bureau, financed by Newsprint Information Committee (1964).

How Editorial Environment Affects Page-Opening, Reading*

Ad Location	Page-Opening		Reading	
Percent of all National advertising which appears in each section	Percent of all readers who open average page		Percent of page openers who read one or more items	
Section	Men	Women	Men	Women
General News 51%	82%	88%	64%	63%
Sports.....18	85	69	60	38
Food, fashion 8	73	88	42	70
Business, finance ...4	77	68	54	42
Radio, TV 3	83	80	68	65
Society 2	81	94	43	68
Amusements.....2	84	90	62	52
All other 13	80	85	52	60

*Source: "A Study of the Opportunity for Exposure to National Newspaper Advertising" by Audits & Surveys, Inc. for the Newspaper Advertising Bureau, financed by Newsprint Information Committee (1964).

"Repetition in Newspapers"*

Results of an intricate field experiment showed that the more an advertising message is repeated, the more slowly it will fade from the consumer's memory once the campaign has ended. Sometimes this sustained effect will continue long after the ads have stopped appearing.

*A 1963 survey designed, analyzed and tabulated by the Harvard Business School, financed by the Canadian newsprint companies making up the Newsprint Information Committee, and supervised by the Newspaper Advertising Bureau.

"The Daily Newspaper and Its Reading Public"*

This survey revealed that 83 percent of the public have talked about stories they saw first in a newspaper; 53 percent within the past three months had saved an item of some sort from a newspaper; and 28 percent had clipped an advertisement, with more than half of them later buying the advertised product.

*A 1961 survey by Audits and Surveys, Inc., financed by the Canadian newsprint companies making up the Newsprint Information Committee and supervised by the Newspaper Advertising Bureau.

HOW U.S. MEDIA SHARED ADVERTISING EXPENDITURES

Source: McCann-Erickson, Inc.
($000,000)

	1985	1984	1975
Newspapers.....	$25,170	$23,522	$ 8,234
Magazines	5,155	4,932	1,465
Television	20,770	19,670	5,263
Radio.....	6,490	5,817	1,980
Others.....	37,165	33,879	10,958
TOTAL	$94,750	$87,820	$27,900

All production costs included.

U.S. TREASURY DEPT., CUSTOMS SERVICE TARIFF CLASSIFICATION STANDARD NEWSPRINT PAPER

(Ed. Note: Following is the U.S. Customs Service's description of duty-free standard newsprint, published as Treasury Decision 56349 dated Jan. 22, 1965 and incorporating T.D. 68-265 (20) dated Nov. 6, 1968.)

The test for determining whether a paper is classifiable as standard newsprint paper under Item 252.65 is whether at the time of its importation the paper is of that class or kind chiefly used in the United States in the printing of newspapers.

Chief use is determinable by the use in the United States at, or immediately prior to, the date of importation, in accordance with General Interpretive Rule 10(e)(i) of the General Headnotes and Rules of Interpretation of the Tariff Schedules of the United States, which provides:

> 10(e) In the absence of special language or context which otherwise requires—
>
> (i) a tariff classification controlled by use (other than actual use) is to be determined in accordance with the use in the United States at, or immediately prior to, the date of importation, of articles of that class or kind to which the imported articles belong, and the controlling use is the chief use, i.e., the use which exceeds all other uses (if any) combined;

The Bureau is presently of the opinion that most papers which conform substantially to the following descriptive specifications:

> **Weight:** 500 sheets each 24 by 36 inches not less than 28½ pounds nor more than 35 pounds. **Size:** rolls not less than 13 inches wide and 28 inches in diameter. Sheets not less than 20 by 30 inches. **Thickness:** not over .0042 inch. **Sizing:** time of transudation of water shall be not more than 10 seconds by the ground glass method. **Ash Content:** not more than 6.5 percent. **Color and Finish:** white; or tinted shades of pink, peach or green in rolls; not more than 50 percent gloss when tested with the Ingersoll glarimeter

are of that class or kind of papers chiefly used in the printing of newspapers in the United States and are, accordingly, classifiable as standard newsprint paper under item 252.65, Tariff Schedules of the United States, so long as the existing conditions of chief use prevail.

PAGES IN A ROLL

Newsprint is now being delivered in both English units and metric units. Using the English system, the number of newspaper pages (one side) in a newsprint roll may be estimated with the following formula:

$$\text{Number of pages} = 432{,}000 \times \frac{A}{(B)\ (C)\ (D)}$$

Where A = Weight of roll in pounds
B = Width of page in inches
C = Length (cutoff) of page in inches
D = Basis weight in pounds (weight of 500 sheets 24 × 36 inches)

If newsprint specifications are in metric units and the page width and length are measured in inches, the following formula is useful:

$$\text{Number of pages} = 1{,}550{,}000 \times \frac{A'}{(B)\ (C)\ (D')}$$

Where A′ = Weight of roll in kilograms
B = Width of page in inches
C = Length (cutoff) of page in inches
D′ = Grammage (weight in grams of one sheet measuring one square meter)

When all measurements are in metric terms, the following formula applies:

$$\text{Number of pages} = 10{,}000{,}000 \times \frac{A'}{(B')\ (C')\ (D')}$$

Where A′ = Weight of roll in kilograms
B′ = Width of page in centimeters
C′ = Length (cutoff) of page in centimeters
D′ = Grammage (weight in grams of one sheet measuring one square meter)

Source: ANPA/RI

SUMMARY OF CONVERSION FACTORS

Inches to centimeters	multiply by	2.54
Pounds to kilograms	divide by	2.2046
Short tons to metric tons	divide by	1.1023
Basis weight to grammage	multiply by	1.627
Centimeters to inches	divide by	2.54
Kilograms to pounds	multiply by	2.2046
Metric tons to short tons	multiply by	1.1023
Grammage to basis weight	divide by	1.627

TYPICAL NEWSPRINT ROLL DIAMETERS, METRIC

Inches	Centimeters	Inches	Centimeters
45	114.3	39	99.1
42	106.7	38	96.5
40	101.6	36	91.4

TYPICAL NEWSPRINT ROLL WIDTHS, METRIC

Inches	Centimeters	Inches	Centimeters
60	152.4	34	86.4
59	149.9	32	81.3
58	147.3	31	78.7
56	142.2	30	76.2
55	139.7	29	73.7
		28	71.1

TYPICAL BASIS WEIGHTS, GRAMMAGE

Basis Weight Lbs./Ream	Grammage g/m²	Basis Weight Lbs./Ream	Grammage g/m²
24	39.05	30	48.82
25	40.68	31	50.45
26	42.31	32	52.08
27	43.94	33	53.70
28	45.57	34	55.33
29	47.19	35	56.96

ASSOCIATION MEETINGS

American Newspaper Publishers Association, May 4-6, 1987, Waldorf Astoria, New York City.

ANPA Operations Management Conference and Exposition, June 6-10, 1987, Las Vegas Convention Center, Las Vegas, NV.

California Newspaper Publishers Association, Feb. 12-15, 1987, Hyatt Regency, Monterey, CA.

Canadian Daily Newspaper Publishers Association, Sept. 17, 1986, Empress Hotel, Victoria, B.C.; April 15, 1987, Westin Hotel, Toronto; Sept. 23, 1987, Hotel Newfoundland, St. John's, N.B.

Inland Daily Press Association, Oct. 19-21, 1986, Drake Hotel, Chicago; Feb. 28-March 4, 1987, Royal Plaza, Disneyworld, FL; Oct. 25-27, 1987, Westin Hotel, Chicago.

International Circulation Managers Association, June 28-July 2, 1987, Hyatt Regency, Chicago.

International Newspaper Advertising and Marketing Executives. Jan. 25-28, 1987, Fontainebleau Hilton, Miami Beach; July 12-15, 1987, Hotel Del Coronado, San Diego.

International Newspaper Financial Executives, Oct. 12-15, 1986, Westin Hotel, Boston; May 10-13, 1987, Marriott Hotel, Marco Island, FL; Oct. 25-28, 1987, Westin Hotel, Seattle.

International Newspaper Promotion Association, May 17-20, 1987, Hilton Harbour Castle, Toronto.

National Newspaper Association, Sept. 24-27, 1986, Opryland Hotel, Nashville; Sept. 30-Oct. 3, 1987, Marriott Hotel, Portland, OR.

Southern Newspaper Publishers Association, Oct. 5-8, 1986, Boca Raton Hotel and Club, Boca Raton, FL; Oct. 11-14, 1987, Greenbrier, White Sulphur Springs, WV.

Suburban Newspapers of America, June 23-27, 1987, Fairmont Hotel, San Francisco.

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